

# IMPORTANT *Information*

## From The *Indiana Education Savings Authority*

### For students and parents of students applying for financial aid for the 2007 – 2008 school year

In addition to the tax advantages and flexible contribution options for the CollegeChoice 529 Investment Plan®, did you know that the assets in your CollegeChoice account might not impact your student's chances of receiving state financial aid?

Indiana law provides that the amount of money that is available in a CollegeChoice 529 Investment Plan account and the proposed use of money in that account on behalf of a beneficiary, may not be considered by the State Student Assistance Commission of Indiana (SSACI) when determining award amounts.

SSACI determines the student's eligibility for state aid based upon the information provided by the student and parent(s) on the Free Application for Federal Student Aid (FAFSA). Federal law requires that assets in a 529 plan be included on the FAFSA. Therefore, in order for SSACI to properly calculate a student's eligibility for state aid, it needs information directly from the account owner and beneficiary.

CollegeChoice 529 Investment Plan is a registered trademark of JPMorgan Chase & Co.

#### > Complete the enclosed form **ONLY** if:

- The current account owner is either a parent of a student or a student who has completed the 2007–08 Free Application for Federal Student Aid (FAFSA)
- The account owner and student are residents of Indiana
- For the 2007–08 academic year, the student plans to attend a post-secondary institution eligible to receive state aid. A list of eligible institutions can be found at [www.IN.gov/ssaci/colleges](http://www.IN.gov/ssaci/colleges).

# Financial Aid Information

## REQUEST FORM

### > USE THIS FORM ONLY IF:

- The current account owner is either a parent of a student or a student who has completed the 2007-08 Free Application for Federal Student Aid (FAFSA)
- The account owner and student are residents of Indiana
- For the 2007-08 academic year, the student plans to attend a postsecondary institution eligible to receive state aid. A list of eligible institutions can be found at [www.IN.gov/ssaci/colleges](http://www.IN.gov/ssaci/colleges).

### 1 Current Account Owner Information

Name (first, MI, last)

Street Address

City, State, Zip

Social Security Number

Daytime Phone (       )

Evening Phone (       )

### 2 Current Beneficiary (Student) Information

Name (first, MI, last)

Social Security Number

Date of Birth (MM/DD/YY)

### 3 529 Account Information

**PARENTS:** What was the amount of money you reported as the net worth of investments on line 88 of the 2007-08 FAFSA? \$ \_\_\_\_\_

Of the money listed on line 88, what was reported from your CollegeChoice 529 Investment Plan account(s)? \$ \_\_\_\_\_

**STUDENT:** What was the amount of money you reported as net worth of the current investments on line 44 of the 2007-08 FAFSA? \$ \_\_\_\_\_

Of the money listed on line 44, what was reported from your CollegeChoice 529 Investment Plan account(s)? \$ \_\_\_\_\_

### 4 Signature

By signing below, I certify that the information contained herein is true and correct.

\_\_\_\_\_

Account owner's signature

\_\_\_\_\_

Date

**Please mail or fax your completed form by May 1, 2007 to:**

State Student Assistance Commission of Indiana (SSACI)  
150 W. Market St., Suite 500  
Indianapolis, IN 46204  
ATTN: CollegeChoice 529 Investment Plan  
Fax: (317) 232-3260 Phone: (317) 232-2353